

REQUIRED ITEMS FOR FILING TAXES

- W-2 (wages or salaries from all employment during the year)
- Interest/Dividend information from: checking/savings accounts, bonds, CD, or brokerage (1099-INT, 1099-DIV)
- Pension and/or IRA distribution (1099)
- Self-employment
- Other income such as gambling winnings, awards, prizes and Jury Duty
- Education Expenses (1098-T)
- Home mortgage payments (1098)
- Proof of paid Real Estate Tax
- Mortgage Insurance Premiums
- HUD Statements First Time Homebuyer Credit
- Energy Conservation Incentives
- Charitable Contributions (Fair market value of non-cash)
- Child/dependent care expenses (Childcare provider ID or SSN)
- Estimated tax payments
- Power of attorney if spouse is not present
- Power of attorney if dependent over 18 is not present
- All Rental Property information and expenses if claiming rental income (Depreciation method)
- For state tax return, name of County and School District
- Any other forms that may assist in properly preparing your tax return